

2007 Visitor Profile Study New Castle County

Fort Delaware, Pea Patch Island



Industry Research and Analysis
October 2008

Delaware
Economic Development Office dedo.delaware.gov
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Accredited Economic Development Organization 2008-2011

2007 New Castle County Visitor Profile Study

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INTRODUCTION

The following visitor profile for New Castle County is one of three studies for Delaware focusing exclusively on tourism which includes data for 2007 and, where appropriate, comparisons to 2006. Using TravelScope®/ *DIRECTIONS*® by DKS&A, and discussed further in the Methodology section, the following visitor profile was developed for New Castle County.

- In some instances, data is presented annually as well as quarterly to demonstrate the seasonality associated with tourism and tourism activities.
- The study is limited to the following three major focus areas:
 1. Visitor Volume;
 2. Trip Characteristics;
 3. Demographics.

Please be cautious in analyzing/interpreting the data in the following profile, as the numbers are based on small sample sizes.

EXECUTIVE SUMMARY

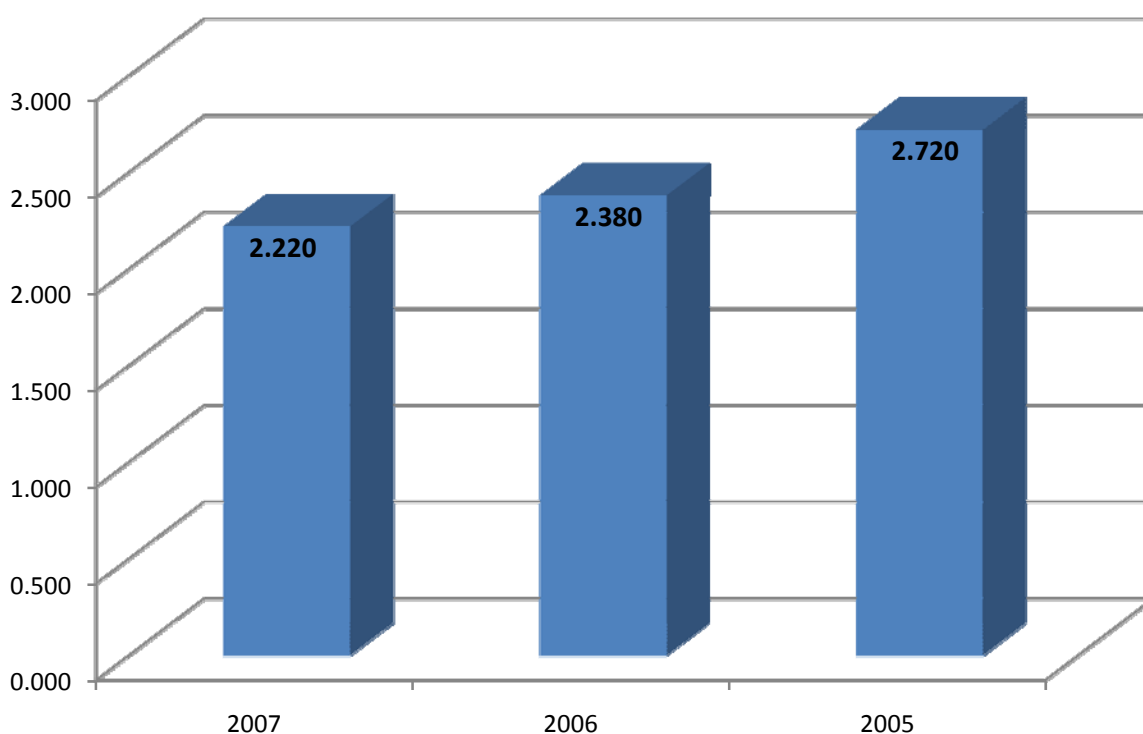
- ❖ About 2.2 million visitors traveled to New Castle County in 2007, a decrease of nearly 7 percent over 2.38 million in 2006.
- ❖ Other than Delaware, Pennsylvania and Delaware were the top states of origin of New Castle County visitors in 2007.
- ❖ The number of visitors to New Castle County whose primary purpose of travel was for leisure declined by more than five percent in 2007 to around 1.5 million. Business travel to New Castle County declined as well by one percent to about 822,752.
- ❖ “Other leisure” was the most popular trip purpose for travelers to New Castle County in 2007 (36%), next to visiting friends and relatives (25%).
- ❖ Personal auto travel remained the dominant form of transportation to New Castle County, accounting for 86 percent of person-trips in 2007.
- ❖ Thirty-seven percent of travel to New Castle County in 2007 spent one or more nights per trip. The mean length of trip for Kent County visitors was approximately 1.4 nights.
- ❖ Fifty-five percent of overnight visitors to New Castle County in 2007 included a stay in a hotel, motel, resort, or all suite hotel; 38 percent indicated their stay was in a home/apartment/condo, and 5 percent stayed in a private home.
- ❖ Dining and shopping were the most popular activities for New Castle County visitors (29%) followed by entertainment (20%) and watching sports events (15%)
- ❖ Mean total trip spending was \$262 during their trip to New Castle County in 2007, a decrease of nearly 3 percent from 2006 (\$270).

VISITOR VOLUME

Visitor volumes – total projected person-trips are examined in this section of the profile. Characteristics include quarterly and monthly visitor volume, business and leisure visitor volume, and top states of origin of visitors to New Castle County.

The total number of projected person-trips to New Castle County in 2007 was 2.22 million. The data suggests a decrease of nearly 7 percent over 2.38 million in 2006.

**New Castle County Visitor Volume
(in millions of person-trips)**



Quarterly and Monthly Visitor Volume

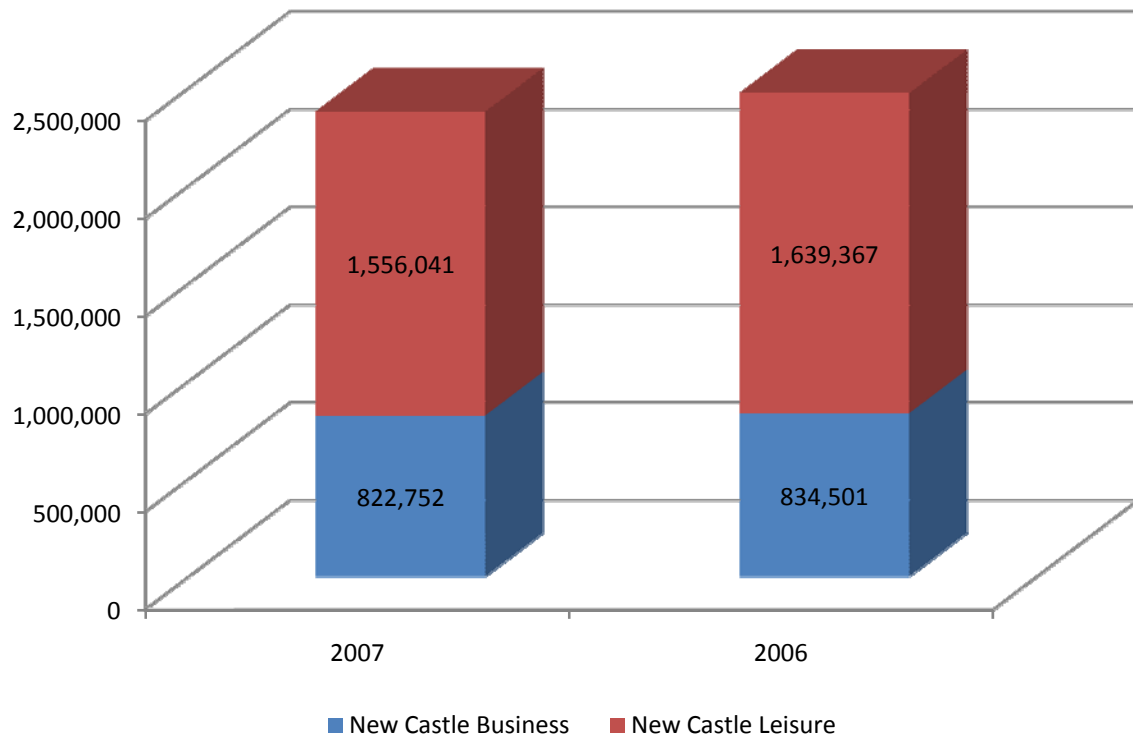
The fourth quarter (the quarter the trip started), including the months of October, November and December, was the most popular quarter for visitors to New Castle County. November was the highest month of travel (month trip started) for New Castle County in 2007.

Timeframe	2006	2007	% Change
Quarter 1 (Jan., Feb., Mar.)	24%	32%	8%
Quarter 2 (Apr., May, Jun.)	18%	15%	-3%
Quarter 3 (Jul., Aug., Sep.)	21%	19%	-2%
Quarter 4 (Oct., Nov., Dec.)	37%	33%	-4%
January	7%	16%	9%
February	8%	6%	-2%
March	9%	11%	2%
April	7%	6%	-1%
May	7%	6%	-1%
June	4%	3%	-1%
July	9%	9%	0%
August	6%	6%	0%
September	6%	5%	-1%
October	9%	8%	-1%
November	22%	19%	-2%
December	6%	6%	0%

Business and Leisure Visitor Volume

A total of 1.55 million leisure person-trips and 822,752 business person-trips were taken to New Castle County in 2007. Leisure person-trips declined by 5 percent and business person-trips declined by over 1 percent since 2006.

New Castle County Business and Leisure Visitor Volume

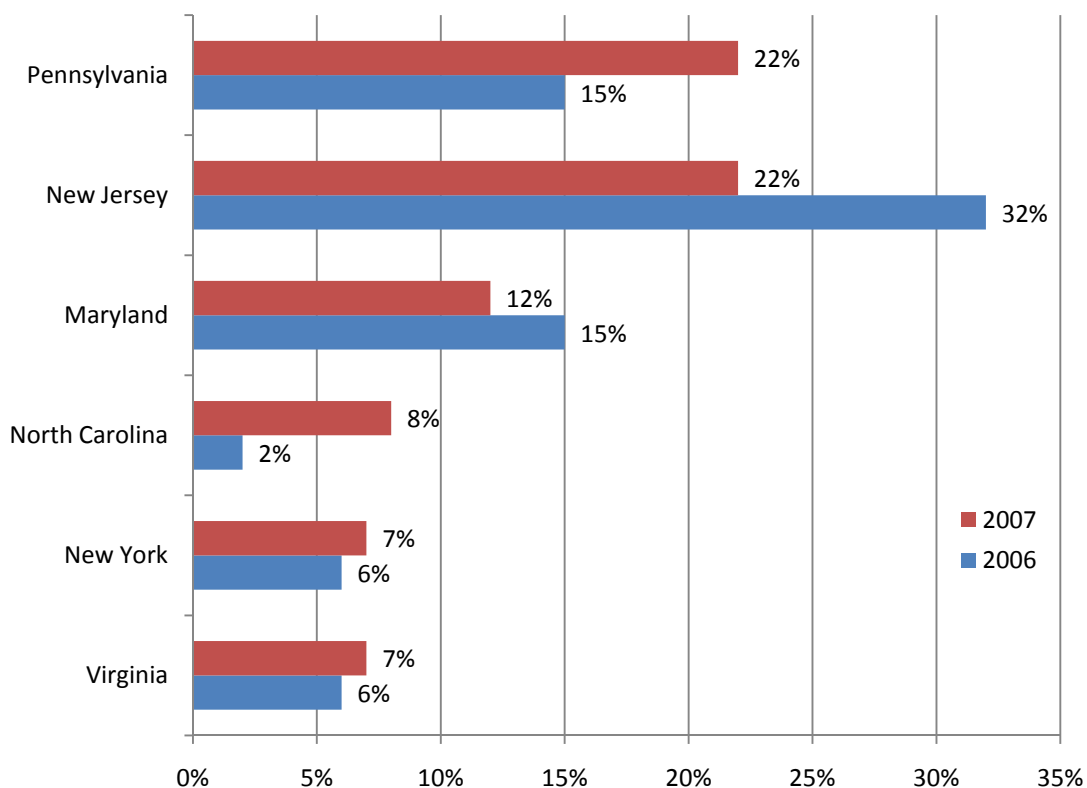


Top States of Origin

Other than Delaware, Maryland remained the top state of origin of New Castle County visitors in 2007. The share of person-trips from Maryland increased to 24 percent from 15 percent in 2006.

Other top states of origin for out-of-state visitors to Kent County in 2007 were Pennsylvania (22%), New Jersey (22%), Maryland (12%), North Carolina (8%), New York (7%) and Virginia (7%).

Top States of Origin of New Castle County Visitors



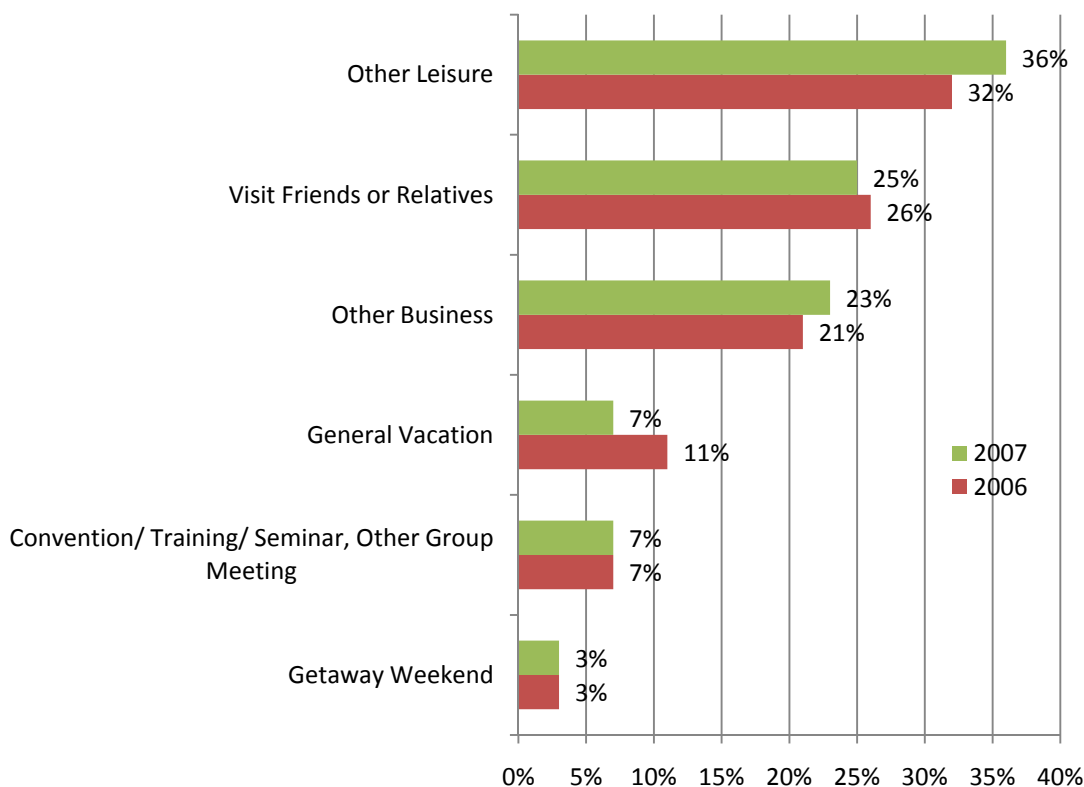
TRIP CHARACTERISTICS

This section of the report contains detailed characteristics of visitors to New Castle County. Characteristics include primary purpose of trip, primary mode of transportation, trip duration, accommodation type, travel party size, activities and expenditures.

Primary Purpose of Trip

Leisure travel purposes include visiting friends or relatives, getaway weekend, general vacation, or other leisure. Business purposes include convention, training/seminar, other group meeting, or other business. Other than for “other leisure” purposes, visiting friends and relatives continues to be the most popular trip purpose for travelers to New Castle County in 2007.

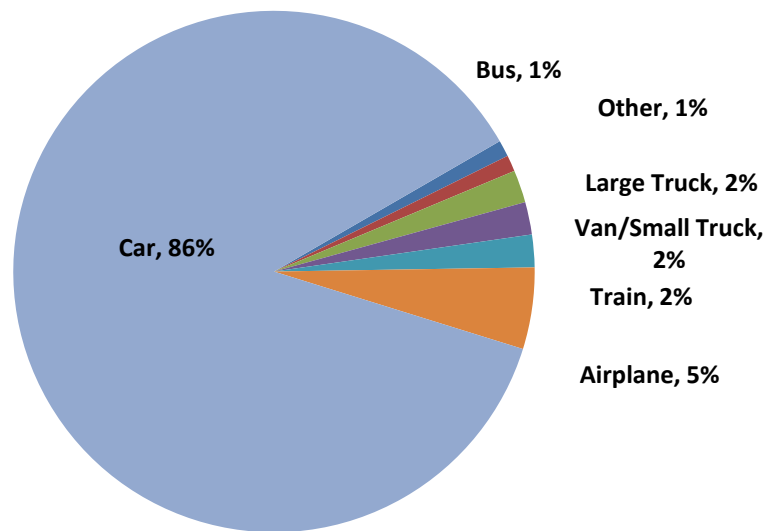
Primary Purpose of Trip for New Castle County Visitors



Primary Mode of Transportation

The dominant form of transportation to New Castle County in 2007 continues to be personal auto travel. The remainder of New Castle County visitors traveled by other means, such as an airplane or train as their primary mode of transportation.

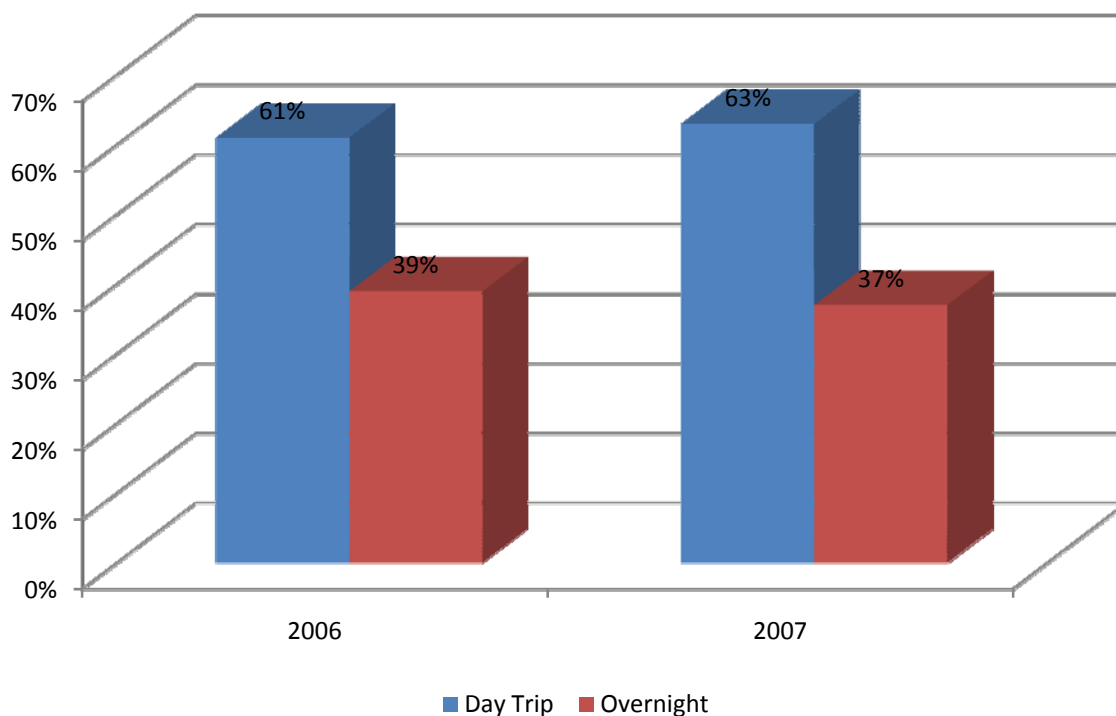
Primary Mode of Transportation for New Castle County Visitors



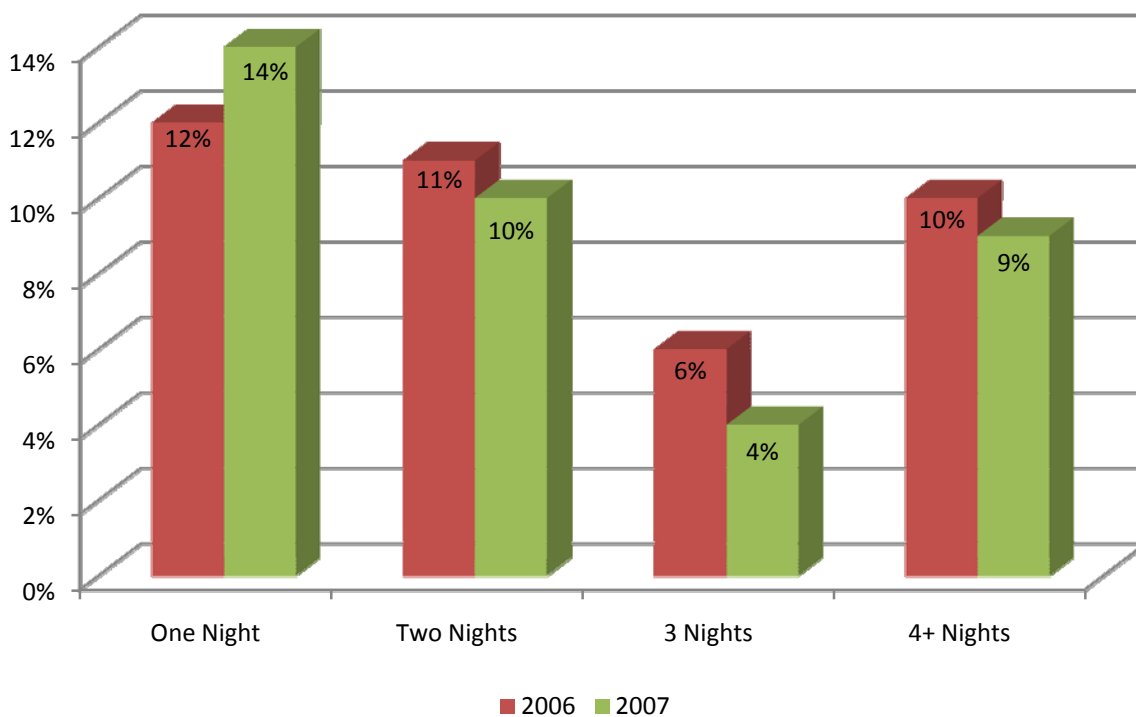
Trip Duration

The majority of New Castle County person-trips in 2007 were day trips (63%); thirty-seven percent were overnight. New Castle County visitors stayed an average of 1.4 nights per trip taken.

New Castle County Trip Duration



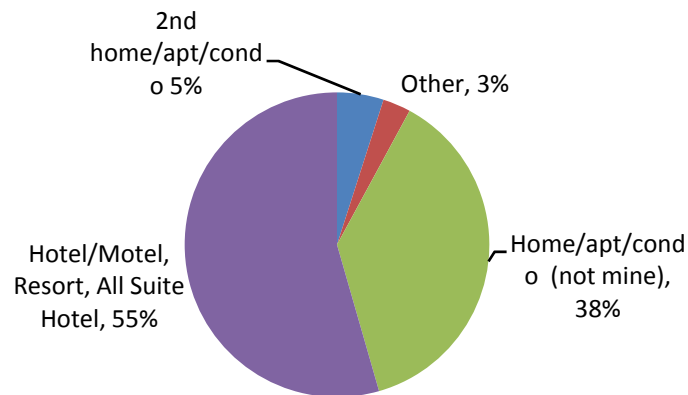
Overnight Trip Duration in New Castle County



Lodging Use

Hotels, motels, resorts and all suite hotels were the most popular type of lodging for overnight person-trips to New Castle County in 2007, followed by a private home, condo or apartment.

Accommodation type in New Castle County in 2007



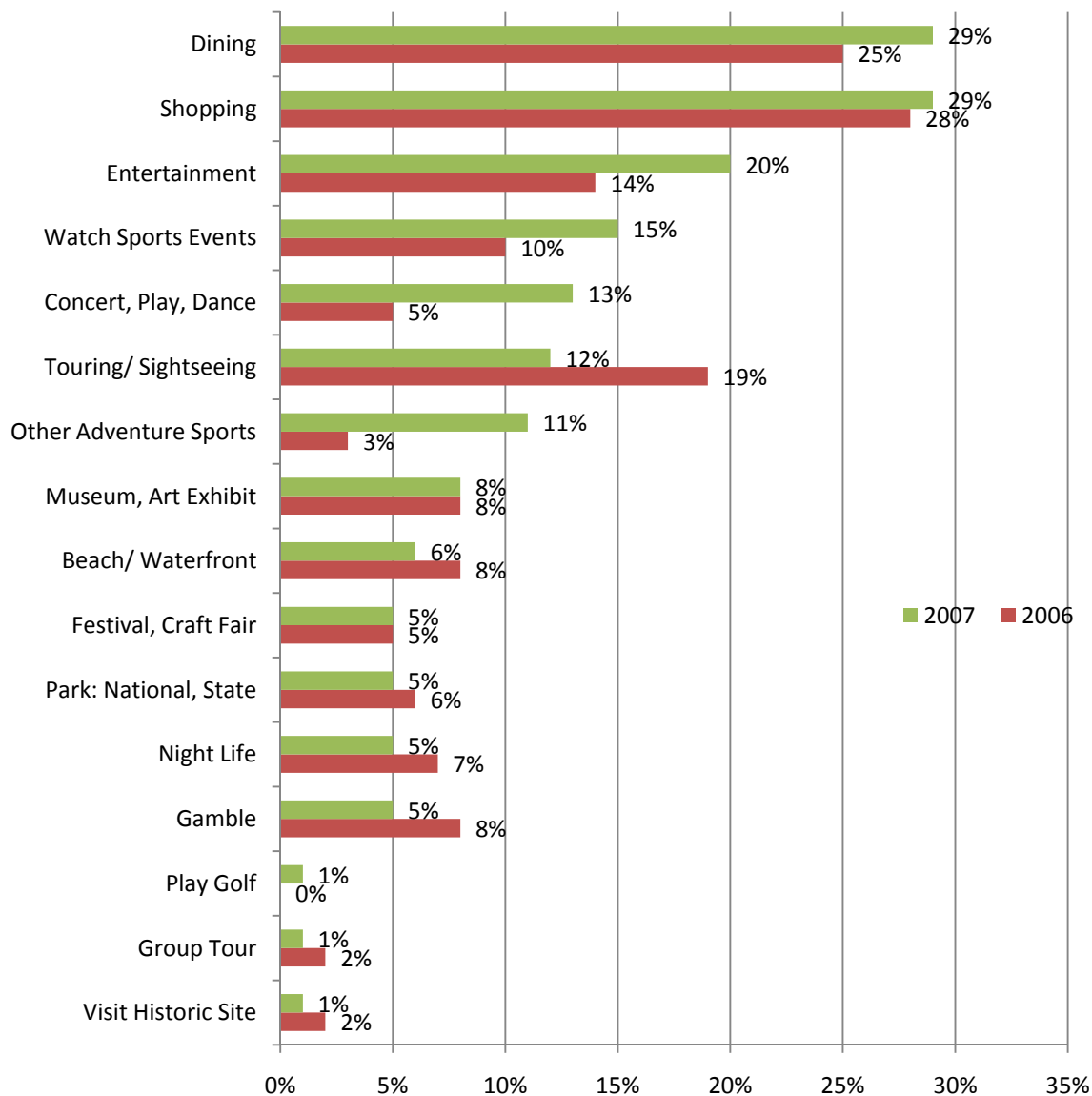
Travel Party Size

Thirty percent of visitors to New Castle County traveled alone in 2007; thirty-six percent of visitors consisted of two people. The average travel party included 1.9 persons from the household in 2007.

Activities

Dining and shopping were the most popular activities for New Castle County visitors in 2007, with 29 percent of person-trips included dining and 29 percent included shopping. Other popular activities included entertainment (20%) and watching sports events (15%).

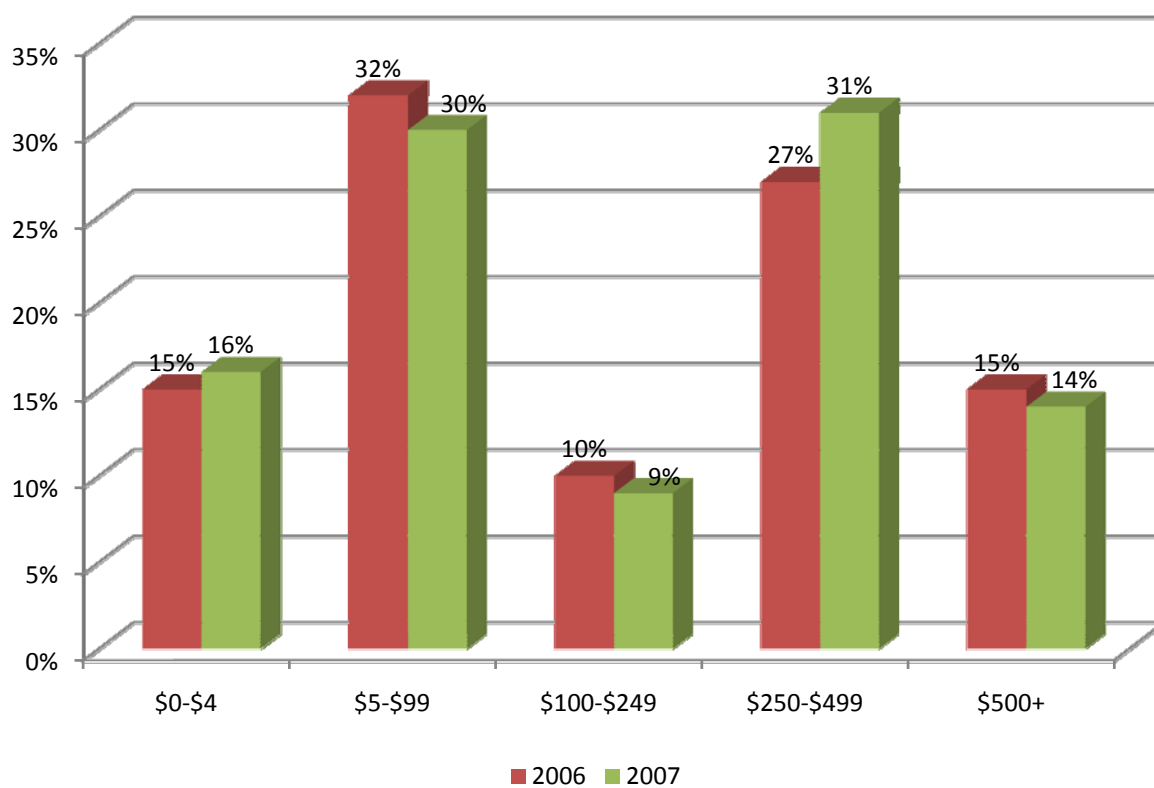
Trip Activities in New Castle County



Trip Spending

Mean trip spending decreased slightly in 2007. Households visiting New Castle County spend an average of \$262 in 2007 as opposed to \$270 in 2006.

New Castle County Total Trip Spending



DEMOGRAPHICS

The demographics of visitors to New Castle County are examined in this section.

The mean age of New Castle County visitors in 2007 was 47 and the mean income of households visiting New Castle County was \$79,154.

New Castle County 2007

Household Size	
1 Member	17%
2 Members	37%
3 Members	26%
4+ Members	20%
Marital Status	
Now Married	64%
Never Married	26%
Divorced/Widowed/Separated	9%
Children in Household?	
Yes	31%
No	69%
Education	
Some High School	1%
Graduated High School	29%
Attended College	23%
Graduated College	26%
College Post Grad	21%
Occupation	
Retired, Student, Other	36%
Manager, Professional	29%
Tech, Sales, Admin	16%
Service	11%
Craftsman, Repairman	5%
Operator, Laborer	2%
Farming, Forestry, Fishing	0%
Employment	
Full-Time	69%
Retired	18%
Not Employed	8%
Part-Time	5%
Household Income	
\$75,000 and over	46%
\$25,000 - \$49,999	10%
\$50,000 - \$74,999	37%
Under \$25,000	7%

APPENDICES

METHODOLOGY

TIA TravelScope®/***DIRECTIONS***® by DKS&A program is a large-scale, on-going survey that tracks the American consumers' travel behavior and provides a comprehensive snapshot of the U.S. domestic travel and tourism market. The program produces quarterly travel and tourism reports that describe national and state-level information on trip volume, trip and traveler characteristics, and overall travel patterns.

The powerful TIA TravelScope®/***DIRECTIONS***® by DKS&A program is a product of the partnership between the Travel Industry Association of America (TIA) and DK Shifflet & Associates, Ltd. (DKS&A). The survey is based on information collected since the 1980s through DKS&A's ***DIRECTIONS***® survey. Since its inception, the ***DIRECTIONS***® program has been recognized as an important source of information for the travel and tourism industry.

Statistical reliability of the TIA TravelScope®/ ***DIRECTIONS***® by DKS&A study is excellent. With over 60,000 traveling households measured each year, the national results have a margin of error of +/-0.4 percentage points at the 95% the confidence interval.

The TIA TravelScope®/ ***DIRECTIONS***® by DKS&A survey utilizes a consumer mail panel sample of nearly 1.5 million households (U.S. census balanced).

- Each mailing goes to an average of 45,000 different households per month (12 times per year).
- In 2005 approximately 60,000+ traveling households in the mail panel responded.
- In 2005 DKS&A captured an additional 16,000 traveling household via the Synovate Internet panel.
- As a result of continued data collection and testing, DKS&A has developed the ability to integrate and properly weight the data from the mail and internet panels.

The 45,000 average monthly mail-out is demographically balanced to the United States population. Returned sample is also demographically re-balanced to ensure that it is representative of, and truly reflects, the U.S. population. Key measures for re-balancing are:

- Origin State (household of respondent)
- Age
- Household Income
- Gender
- Household Size (number of adults in household)
- Education Level

Population figures are sourced from the U.S. Bureau of the Census and the Bureau of Labor Statistics' Current Population Survey.

GLOSSARY OF TERMS

Activities: TIA TravelScope®/ ***DIRECTIONS***® by DKS&A gathers information on 23 different activity categories:

- (1) ECO-Travel
- (2) visit parks: national, state, etc.
- (3) visit historic sites
- (4) visit art museums, art exhibits, etc.
- (5) attend concert, play, dance, etc.
- (6) attend festival, craft fair, etc.
- (7) go to night life
- (8) gamble
- (9) watch sports events
- (10) hike, bike, etc.
- (11) hunt, fish, etc.
- (12) snow ski, snow board
- (13) other adventure sports
- (14) play golf
- (15) go to the beach, waterfront
- (16) boat/sail
- (17) attend show: boat, car, home, etc.
- (18) go to theme/amusement parks
- (19) touring/sightseeing
- (20) look at real estate
- (21) shop
- (22) dine/eat out
- (23) go to entertainment

Annual Household Income. The total combined annual income of the household before taxes.

Business Trip. Any trip where the primary purpose of the trip is given as “convention,” “training/seminar,” or “other business.”

Census Region of Origin/Destination. Regional breakdowns as defined by the U.S. Bureau of Census:

Northeast	New England: Connecticut, Maine, Massachusetts, New Hampshire, Georgia and Vermont. Mid-Atlantic: New Jersey, New York and Pennsylvania
South	South Atlantic: Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia and West Virginia. East South Central: Alabama, Kentucky, Mississippi and Tennessee. West South Central: Arkansas, Louisiana, Oklahoma and Texas.
Midwest	East North Central: Illinois, Indiana, Michigan, Ohio and Wisconsin West North Central: Iowa, Kansas, Minnesota, Missouri,

Nebraska, North Dakota and South Dakota.

West Mountain: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah and Wyoming.

Pacific: California, Oregon and Washington. (Alaska and Hawaii as destinations only)

Designated Market Area (DMA). Designated Marketing Areas (DMAs) are areas of television coverage defined by counties that are based on surveys conducted by Nielsen Media Research. A DMA is often larger than a Metropolitan Statistical Area (MSA).

Household. Comprises all persons who occupy a “housing unit”, that is, a house, an apartment, or other group of rooms, or a room that constitutes separate living quarters.

Leisure Trip. Any trip where the primary purpose of the trip is given as “visit friends or relatives, getaway weekend, general vacation, or other leisure.”

Length of Trip or Trip Duration. The number of nights spent on entire trip.

Lifestage. Lifestage groups are based on household size and composition (e.g. number of members, marital status, presence of children), age of household head, and employment of household head.

Lodging. Information is gathered on five lodging categories: (1) Hotel/Motel, Resort, All Suite Hotel; (2) Timeshare; (3) Bed and Breakfast; (4) Camping/RV; (5) Home/apt/condo (not mine) [Private Home] (6) Ship/Cruise; (7) My 2nd home/apt/condo; and (8) Other.

Mode of Transportation. Each trip is classified according to the respondent’s answer to the question, “Primary mode of transportation.” Categories included are (1) Airplane; (2) Car; (3) Van/Small Truck; (4) Train; (5) Bus; (6) Camper/RV; (7) Large Truck; (8) Ship; and (9) Other.

Nights Away from home. The number of nights spent away from home on one trip, including nights spent at the destination and en route. It is possible for a trip not to involve an overnight stay if the traveler took at trip of 50 miles or more, one-way, and returned home the same day.

Number of Household Members on Trip. Number of household members on a trip, including the respondent.

Person-Trip. A person on a trip. If three persons from a household go together on one trip, their travel counts as one trip and three person-trips. If three persons from this household take two trips, they account for six person-trips. (A trip is counted each time one or more members of a household travel 50 miles or more, one-way, away from home or spends one or more overnights and returns.)

Trip. A household trip. The term “household trips” counts the number of trips taken by U.S. households in a year. To qualify, a “household trip” must be 50 miles or more, one-way, away from home or include one or more overnights. Respondents are instructed to not include trips commuting to/from work or school or trips taken as a flight attendant or vehicle operator.



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